

ERG Contract No. EP-C-09-020
Work Assignment No. 3-12
Amendment 1

Performance Work Statement

1. **Title:** Gulf Coast Ecosystem Restoration Task Force Support

2. **Work Assignment Manager (WAM):**

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3. **Level of Effort:** 1,480 Hours (Revised)

- Task 1: 25 Hours
 - Task 1(A): 10 Hours
 - Task 1(B): 15 Hours
- Task 2: 1,455 Hours
 - Task 2(A): 380
 - Task 2 (A)(1): 175
 - Task 2(B): 600
 - Task 2(C): 300

(NOTE: While this amendment includes a new sub-task, 2(A)(1) for meeting facilitation, a supporting analysis has been removed from Task 2(A). Additional travel costs are required to cover contractor travel to the Gulf of Mexico for a facilitated meeting. Please review entire PWS for changes and provide a revised work plan and cost estimate.)

4. **Period of Performance:** Approval of Amendment to February 28, 2013

5. **Background:** The Gulf Coast Ecosystem Restoration Task Force (Task Force) was charged with developing an ecosystem restoration strategy to effectively address the longstanding ecological decline in the Gulf of Mexico and to begin moving toward a more resilient Gulf Coast ecosystem. The Task Force is an inter-agency, inter-governmental advisory body that was established on October 5, 2010 through Executive Order 13554.

The driver for the Executive Order was an event the President termed "one of the worst environmental disasters in America's history," the Deepwater Horizon catastrophe in the Gulf of Mexico. This event, coupled with a series of complex issues, has contributed to the Gulf of Mexico's long-term ecological decline. In the Executive Order, President Obama directed the federal government to work with the states, local governments and tribes to help conserve and restore

resilient and healthy ecosystems which support the surrounding regions' economies, communities and cultures.

The Task Force developed and released a preliminary Gulf of Mexico Regional Ecosystem Restoration Strategy on October 5, 2011; the final Strategy was delivered to President Obama on December 2, 2011. The delivery of the Strategy marked the beginning of an implementation phase for the Task Force. The Strategy identified goals and major actions for restoring the Gulf Coast, and serves as the basis for restoration implementation actions. To further its mission, the Task Force is undertaking the development of an action plan to support the goals of the restoration strategy.

EPA's Administrator serves as chair of the Task Force. EPA's Office of Wetlands, Oceans and Watersheds (OWOW) shares responsibility for staffing and supporting the EPA water quality and restoration issues of the Task Force.

6. Purpose: The Task Force is directed to develop a restoration strategy that sets forth ecosystem restoration goals and performance measures to track progress on shared priorities. Section 4 of the Executive Order 13554 states:

- (a) Within 1 year of the date of this order, the Task Force shall prepare a Strategy that proposes a Gulf Coast ecosystem restoration agenda, including goals for ecosystem restoration, development of a set of performance indicators to track progress, and means of coordinating intergovernmental restoration efforts guided by shared priorities. In developing the Strategy, the Task Force shall:
 - (1) define ecosystem restoration goals and describe milestones for making progress toward attainment of those goals;
 - (2) consider existing research and ecosystem restoration planning efforts in the region, including initiatives undertaken by the National Ocean Council and the Mississippi River/Gulf of Mexico Watershed Nutrient Task Force (Gulf Hypoxia Task Force), in order to identify planning and restoration needs and ways under existing authorities to address those needs;
 - (3) identify major policy areas where coordinated intergovernmental action is necessary;
 - (4) propose new programs or actions to implement elements of the Strategy where existing authorities are not sufficient;
 - (5) identify monitoring, research, and scientific assessments needed to support decision making for ecosystem restoration efforts and evaluate existing monitoring programs and gaps in current data collection; and
 - (6) describe the circumstances under which termination of the Task Force would be appropriate.

7. Objectives: The objective of this Work Assignment is to provide technical support to EPA for the development and production of the Task Force's restoration implementation support efforts, and supporting documents. This includes, but is not limited to, implementation support documents and supplemental reports, materials and documents for use by the Task Force, EPA HQ and Regions, other federal agencies, states, and the public about the strategy and its goals and the supporting its implementation. It also includes materials needed for briefings; hearings, public meetings, and

listening sessions, which may include, but is not limited to, presentations, videos, fact sheets, brochures, and other supporting documents or materials. It also includes facilitation of meetings to support implementation of the Strategy and restoration efforts. This work may include review of existing sources, documents, reports, public and tribal comments, and other materials applicable to the goal areas in the Strategy; compilation and/or analysis of current activities related to the Strategy's four goal areas; support for restoration efficiency efforts, including best practices and identification of potential barriers; identification of potential performance measures; and/or identification of gaps in the information available.

The scope of technical support may include:

- Making available a wide range of technical expertise including, but not limited to:
 - document development, design, editing and production;
 - implementation support planning;
 - meeting facilitation;
 - performance measure and baseline analysis; and
 - economic analysis.
- Providing technical support, including, but not limited to:
 - preparing lay-out and design, including identifying, selecting, placing, and producing copy-right free graphics and images;
 - providing analysis in support of implementation support efforts;
 - facilitating meetings;
 - technical writing and technical/copy editing services; and
 - formatting for briefings, visual aids, and PowerPoint slide presentations.
- Drafting, revising, and finalizing documents, including, but not limited to:
 - strategy documents and supplemental reports;
 - implementation support document and supplement documents;
 - technical documentation;
 - briefing packages; and
 - formal presentations.
- Producing documents and supplemental reports in electronic formats suitable for:
 - printing by EPA's in-house print shop (i.e. print-ready files on DVD with all required supporting files);
 - posting to the Task Force's web site (i.e. pdf) publication; and
 - DVD copies formatted for distribution.

8. Description of Tasks:

Please note the schedule of deliverables listed below has been indicated by a due date or an estimated length of time. If during the period of performance of this work assignment any deliverable dates need to be changed, the WAM will amend the PWS through formal contracting procedures.

Task 1:

(A) Development of a revised Work Plan and Cost Proposal

The Contractor shall develop a revised work plan describing the necessary steps and estimated hours and costs to complete this amended PWS. The work plan shall also

identify all of the key personnel participating in this work assignment. The work plan shall be due 21 days from the date of issuance of this work assignment.

(B) Development of a Quality Assurance Project Plan (QAPP)

The contractor shall develop a Quality Assurance (QA) Project Plan (QAPP) for assessing that the existing environmental information and data used meets quality criteria and addressing any uncertainty involved in completing the task.

Requirements for a QAPP can be found at <http://www.epa.gov/quality/qs-docs/r5-final.pdf>, Titled: EPA Requirements for Quality Assurance Project Plans EPA QA/R-5. Guidance for implementing the requirements for a QAPP can be found at <http://www.epa.gov/quality/qs-docs/g5-final.pdf> or *Guidance for Quality Assurance Project Plans (G-5)*, titled: Guidance for Quality Assurance Project Plans (G-5) - December 2002, EPA/240/R-02/009. The contractor shall pay particular attention to guidance for projects using existing data, and non-direct measurements in EPA G-5. The QAPP shall state the requested technical services shall be conducted in accordance with the contract's Quality Management Plan (QMP), and the project-specific QAPP.

Approval of the QAPP is required by EPA's WAM, PO and OWOW QA Officer, before the Contractor shall incur any billable costs relating to environmental data collection activity pertaining to this work assignment. If any quality assurance issues and/or problems occur, the Contractor shall notify the WAM, to discuss the method of resolution. The contractor shall report QA progress and difficulties encountered and any corrective actions, including method of resolution, in monthly progress reports.

Deliverables: The Contractor shall provide the following deliverables:

TASK	DELIVERABLES	DUE DATE TO EPA
Task 1: (A) Work Plan	The Contractor shall provide a revised Work Plan and Cost Proposal	Due 21 days after issuance of the work assignment
Task 1: (B) Quality Assurance Project Plan	The Contractor shall provide a revised Quality Assurance Project Plan (QAPP)	Due 21 days after issuance of the work assignment

Task 2: Support the Development of the Gulf of Mexico Regional Ecosystem Restoration Strategy Implementation Support Documents

Following the delivery of its restoration strategy, the Task Force began its implementation phase. As part of implementation, the Task Force is further refining its restoration goals and establishing performance measures and milestones. The Task Force is preparing implementation support documents. It also intends to prepare a summary of, and response to, public feedback provided on a draft version of the implementation support document. The Task Force will prepare related communication materials as well.

(A) Prepare Background Analyses

To support the development of the implementation support the contractor shall prepare background and supporting analyses. This may include, but is not limited to, an assessment of existing sources, documents, reports, comments and other materials to identify baseline conditions applicable to the goal areas identified in the Strategy document. It may include a compilation and/or analysis of current activities related to the Strategy's four goal areas; support for restoration efficiency efforts, including best practices and identification of potential barriers; identification of potential performance measures; and/or identification of gaps in the information available. It may include an economic impact analysis, for which the contractor shall gather existing information which includes, but is not limited to: the valuation of adverse impacts and losses incurred to date to the Gulf coast ecosystems; the costs associated with not doing restoration activities (continuing business as usual); and economic projections of the benefits of restoration actions, including the value of "green" jobs created in the restoration process. Assessments may include, but are not limited to, the methodology used in the review, sources reviewed, current conditions, options for the baselines for the various goals, and the identification of performance measures and milestones. Analyses may also include identification of gaps in the information that is available. Technical direction will be issued by the WAM and that provides clarification for this task. The Contractor shall provide a QA report with the final analyses. EPA anticipates up to two, although there may be fewer, analyses: a baseline/current conditions analysis; a benchmark/performance measures analysis; and an economic analysis.

1. The contractor shall support the facilitation of meetings of teams or groups established to assist implementation support efforts. The contractor shall facilitate a 2-day meeting in the Gulf region in July, for which the contractor shall arrive the day prior to meet with EPA. The contractor shall prepare for any facilitated meetings, which includes, but is not limited to the following: developing an agenda, presentations, or other meeting materials, which include, but are not limited to, a pre-meeting questionnaire for participants, preparing flip charts or overheads for use at the meeting; participating in any pre-meeting planning calls with EPA as well as pre-meeting calls with participants to prepare them for the discussion at the facilitated meeting; and any information gathering efforts needed prior to the facilitated meeting. The contractor shall facilitate the meeting. As facilitator the contractor shall manage the process for a successful meeting. As facilitator, the contractor shall not offer opinions about what is being discussed, but instead focus on how issues are being discussed. As facilitator the contractor shall be a procedural expert who helps support the meeting's effectiveness by ensuring adherence to the timeframes and agenda objectives. The facilitator shall work with EPA during breaks to adaptively manage the meeting and adjust the agenda as needed over the course of the meeting. Facilitation includes, but is not limited to: ensuring the meeting is well organized and pursues a clear objective; structuring the meeting; leading the discussion; encouraging participation and dialogue; maintaining procedural guidelines such as timeframes and ground rules; and having handouts or flipcharts to

aid in discussion and group activities. The contractor shall also take notes at the facilitated meeting and provide a summary of the meeting to EPA after the meeting. The contractor shall conduct any follow-up after the meeting as directed by the WAM through written technical direction. This follow-up includes, but is not limited to, working with participants to ensure their ideas and comments are accurately captured in any meeting summary. EPA anticipates no more than three facilitated meetings by the contractor.

(B) Support for the Development of Implementation Support Documents for the Gulf of Mexico Regional Ecosystem Restoration Strategy (Strategy)

The contractor shall provide support in planning the development, drafting and revising, and formatting the final implementation support document and any supporting materials, such as appendices or related documents that support the action plan. Prior to formatting the final document in the selected software, EPA anticipates multiple levels of review and revision of the draft document in a standard word processing format such as Microsoft Word or PowerPoint or other agreed upon format. Comments on each draft will be provided via technical direction by the EPA WAM. Once the document has been formatted, EPA anticipates two levels of review prior to its being finalized. Additionally, the contractor shall provide

The contractor shall provide support in: planning for, writing, editing, designing, providing references for, and formatting the implementation support document and any supporting documents, including appendices or other documents created or used to support implementation of the Gulf Coast Ecosystem Restoration Strategy. This includes ensuring all documents comply with EPA style guidelines as laid out in the Stylebook for EPA Communication Product Standards (<http://www.epa.gov/productreview/stylebook/index.html#background>) and Section 508 requirements. Additionally, the contractor shall develop related communication materials that reflect a "look and feel" consistent with the Task Force and Strategy document "brand." EPA anticipates this may include, but is not limited to, brochures, fact sheets, displays, quick guides, FAQs, videos, or presentations. EPA anticipates two such communication products for the Strategy, a brochure and a presentation, that were begun under the previous WA 2-12, will be finalized and another 3-4 of these other related communication materials for the Strategy or Implementation Action Plan shall be developed.

(C) Other Editorial and Document Support

The contractor shall provide other editorial and document support as required by the WAM, which may include, but is not limited to, the following activities. EPA anticipates several document review processes, including multiple review processes managed by the Office of Management and Budget (OMB) and at least one public review and feedback period. Upon direction from the WAM, the contractor shall provide support with coordinating, compiling and tracking comments and requested revisions that are part of these review processes. This includes: comment analysis; setting-up a database to track comments and requested revisions; the disposition of

the proposed revision; and the resolution of the revision. Additionally, EPA anticipates translating the document and other supporting documents into languages other than English. Upon written technical direction from the WAM, the contractor shall design and format these non-English documents to be consistent with the English version. EPA anticipates the possibility of translating implementation plan materials into two additional languages, Vietnamese and Spanish. Formatting of non-English versions will involve the same level of effort as the final formatting of the English version; all versions shall have the same “look and feel.”

Deliverables:

TASK	DELIVERABLES	DUE DATE TO EPA
Task 2 (A): Prepare Background Analyses	Upon written technical direction from WAM and copied to the EPA CO, contractor to provide background/supporting analyses for implementation action plan	Within one month of Task Force delegates meeting
	The Contractor shall provide a QA report with the final analyses.	At the time of delivery of the background/ supporting analyses
Task 2 (A) (1)	Facilitate meetings to assist in implementation support	Within one month of Task Force delegates meeting
Task 2 (B): Support for Development of Implementati on Support Document	The Contractor to provide preliminary implementation support document and all associated supporting documents, including appendices or other documents created or used to support the implementation plan, to EPA based on comments received from EPA WAM	Within one month of Task Force delegates meeting
	The Contractor to provide final, fully formatted version of final implementation support document and associated supporting documents, including appendices or other documents created or used to support the implementation plan, to EPA based on comments received from EPA WAM	Within one month of Task Force delegates meeting
	The Contractor to provide final, fully formatted versions of Strategy communication materials already begun under WA 2-12	Within one month of Task Force delegates meeting
	Upon written technical direction from the WAM and copied to the EPA CO, contractor to provide any related communication products for the strategy or implementation support document	Within two months of the release of the implementation action plan

TASK	DELIVERABLES	DUE DATE TO EPA
Task 2 (C): Other Editorial and Document Support	The Contractor to provide analysis support for review of public feedback and comments	Within one week of close of public feedback period
	The Contractor to provide preliminary, formatted version of the translated implementation action plan for public feedback and comment	Within 1 day of providing the translated documents
	The Contractor to provide final formatted version of the translated implementation action plan	Within 2 weeks of providing the translated documents

The Contractor shall provide a QA report with the final deliverable.

8. General Work Assignment Requirements:

1. Due Dates: The contractor shall notify the WAM in advance if a due date will not be met and request a revised date.
2. Draft Documents: The contractor is required to submit draft documents for WAM's review. Draft documents shall be prepared in an electronic format (MS Word, tif/gif, pdfPowerPoint). WAM will provide comments on draft submissions prior to submission of final documents.
3. Final Documents: The contractor shall submit final documents both electronically (MS Word, tif/gif, pdf, PowerPoint, or other specified format upon approval of the WAM) and in hardcopy as specified by WAM.

TRAVEL:

EPA anticipates face-to-face meetings with ERG principals as needed. Additionally, EPA anticipates travel by ERG staff for facilitation and note-taking for facilitated meetings. EPA anticipates travel by two ERG employees to the Gulf of Mexico region for a facilitated meeting in July that will require 3 days of travel. The travel costs associated with all travel must be approved by the EPA Project Officer prior to taking place. Any travel chargeable to this work assignment shall be allowable only in accordance with the limitation of FAR 31.205-43 and FAR 31.205-46, and must be approved by the EPA Project Officer prior to travel taking place. EPA anticipates travel by two ERG contractor employees may be necessary two times to meet with Task Force staff and/or delegates to present findings from analyses and/or implementation plan work.

CONTRACTOR IDENTIFICATION:

Contractor personnel shall clearly identify corporate affiliation at the start of any meeting. While attending EPA-sponsored meetings, conferences, symposia, etc. or while on a Government site, Contractor personnel shall wear a badge which identifies the individual as a contractor employee. Contractor personnel are strictly prohibited from acting as a representative of the Agency at meetings, conferences, symposia, etc.

SPECIAL CONDITIONS:

A. The contractor shall provide all materials written under these tasks to the EPA WAM, as per work assignment, in electronic form and hard copies of the final products. Electronic versions shall be in Microsoft Word and/or PDF, or another agreed upon format compatible with EPA's system capabilities.

B. The contractor shall provide signed copies of all consultant agreements for the experts required in support of this work assignment to the EPA Contracting Officer.

CONFIDENTIALITY:

Some of the work assigned under these tasks will be to draft, edit and review sensitive program and organizational information. The contractor shall not discuss the contents of the conference or workshop discussions with anyone that did not participate in those discussions.

NOTICE REGARDING GUIDANCE PROVIDED UNDER THIS WORK ASSIGNMENT:

Guidance is strictly limited to technical and analytical support. The contractor shall not engage in activities of an inherently governmental nature such as the following:

- (1) Formulation of Agency policy
- (2) Selection of Agency priorities
- (3) Development of Agency regulations

Should the contractor receive any instruction from the WAM that the contractor ascertains to fall into any of these categories or goes beyond the scope of the contract or work assignment, the contractor shall immediately contact the Project Officer or the Contracting Officer.